RMTTF Meeting

Wednesday, March 20

9:30 AM

This meeting is being held WebEx and in person.

Oncor Electric Delivery

1616 Woodall Rodgers Fwy. Conf room 5007

Dallas, TX 75202

Tomas Fernandez chaired the meeting.

Tomas welcomed everyone and proceeded with reading the antitrust statement and those listed on the WebEx. Those in the room introduced themselves.

**Attendees**

* Kathy Scott Centerpoint
* Bill Snyder AEP
* Amy Sue Stirland LP&L
* Debbie McKeever Oncor
* Melinda Earnest AEP
* Sheri Wiegand Vistra
* Monica Jones Centerpoint
* Art Deller ERCOT
* Eric Lotter GridMonitor
* Tomas Fernandez NRG
* Jesse Macias AEP

**Meeting Agenda**

Tomas read the agenda. No questions were asked. No changes were made.

It was noted that the RMTTF meeting page for today included a different agenda visible but the attached agenda posted under documents was the correct agenda. Debbie will notify ERCOT.

**Meeting Notes**

Meeting notes from the last meeting were reviewed.

None of the leadership received requests for other changes.

The date for the TX SET 5.0 training should have been 4-30.

No one in the room requested any other changes.

Meeting notes for our last meeting are considered final.

**LMS Stats**

ERCOT Learning Management System (LMS) counts for Web Based training modules are below.

Art noted that the stats are as of this morning.

MarkeTrak online numbers grew significantly.



There are 42 out of 50 are registered for the TX SET training to be held in Houston on 4-30-2025.

Melinda will send another email notice reminder out on 3-25. We will check the registration number before sending. If registration is at 50/capacity is full, then Melinda will send the notice as a reminder and request that those registered, if they cannot attend to please cancel. Also, a wait list will be available for people to sign up. Usually, we have some cancellations.

A list of those registered will be provided to CenterPoint. They will need to sign in at security, on the 2nd floor of Centerpoint Plaza.

exas SET enrollment for 4/30/25 - 2/50 Art Deller Manager, Market Training 2705 West Lake Drive, Taylor, TX 76574 O: 512-248-6505 | M: 512-657-9775 ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍ ‍

**MarkeTrak Training held 2-25, 2-26-survey results**

Tomas led the discussion. The instructors were Tomas, Monica, Sheri, Melinda, Kathy, Debbie.

24 people took the survey.

13 REPs

9 TDSP

1 ERCOT

1 QSE

Question was asked, why would a QSE attend MarkeTrak training. Some REPs are their own QSE with a small staff, so they have multiple positions at their company. The class would be helpful.

Every survey result was positive, although 2 indicated the training did not apply to their job.

During the training class, we identified some slides that need updates and/or clarity. One was Bulk Insert. Sheri said some were hers.

Art provided the links to the modules.

**TX SET 5.0 Training**

Since we will be moving to WebEx only training after June 5.0 training, we will need a practice for the presenters to know how to do breakout sessions and ensure everything goes smoothly.

We may need to set up a meeting just for the trainers to “practice” and may be in September.

We need to draft what needs to be posted and when for the attendees to use during WebEx.

We will encourage people to turn on their cameras. That will really help the instructors.

Art will add the June 25th class to the ERCOT LMS. Will be in person only at Oncor.

Sheri provided the address. This is the location for the June 25th meeting.

Vistra

1925 W. John Carpenter Fwy.

Irving, TX 75063

Start time: 8:30 AM

Note! This was captured during the last meeting. We need a new Checkpoint question to be added: When is the only time when a backdated move-in would not include an IA or CR code? Answer: Safety Net

Instructor will note this is a trick question…or think hard…something like that.

Note! Art is going to send us the links. We will add those to today’s meeting page.

**Dates for 2025 Retail Training and Meetings**

We made adjustments today:

We will add Retail 101 going forward. June 18th Retail 101 class was added.

Location of the October 28th RMTTF meeting – will now be held at AEP time; 1:30 PM.

Below includes the updated schedule. We will review at each meeting.

\* Designates WebEx only.

\*\* Designates In person only

\*\*\* Designates In person and WebEx – as applicable to some RMTTF meetings only

Green highlighted text indicates past meeting or training prior to today’s meeting.

|  |  |  |  |
| --- | --- | --- | --- |
| Date | Time | Meeting or training | Comments |
|  |  |  |  |
| **FEBRUARY**  |  |  |  |
| Tuesday, February 25 | 8:30 AM | MarkeTrak Part 1 \* | 7:45 AM, Instructors arrive at ERCOT  |
| Tuesday, February 25 | 1:30 PM | RMTTF meeting \*\*\* | WebEx and in person in at ERCOT  |
| Wednesday, February 26 | 8:30 AM | MarkeTrak Part 2 \*  | 7:45 AM, Instructors arrive at ERCOT  |
|  |  |  |  |
| **MARCH** |  |  |  |
| Thursday, March 20 | 9:30 AM | RMTTF meeting \*\*\* | WebEx and in person - Dallas at Oncor |
|  |  |  |  |
| **APRIL** |  | No meeting |  |
| Tuesday, April 29 | TBD | Training Set up  | Instructors arrive late afternoon to Set up  |
| Wednesday, April 30 | 8:30 AM | TX SET training\*\* | 7:45 AM: Instructors arrive at CNP  |
|  |  |  |  |
| **MAY** |  |  |  |
| Thursday, May 1st  | 9:30 AM | RMTTF meeting\*\*\* | WebEx and In person at CNP  |
|  |  |  |  |
| **JUNE** |  |  |  |
| June 18 | 8:30 AM |  | WebEx only |
| Wednesday, June 25 | 8:30 AM | TX SET Training \*\* | In person only – Irving at Vistra  |
| Thursday, June 26 | 9:30 AM | RMTTF meeting\*\*\* | WebEx and in person in Dallas at Oncor |
|  |  |  |  |
| **JULY** |  | NO MEETING |  |
|  |  |  |  |
| **AUGUST** |  |  |  |
| Thursday, August 7 | 9:30 AM | RMTTF meeting\*\*\* | WebEx only  |
|  |  |  |  |
| **SEPTEMBER** |  |  |  |
| Wednesday, September 24 | 8:30 AM | MarkeTrak Part 1\* | 7:45 AM: Instructors arrive at Oncor  |
| Wednesday, September 24 | 1:30 PM | RMTTF meeting\*\*\* | WebEx and In person in Dallas at Oncor |
| Thursday, September 25 | 8:30 AM | MarkeTrak Part 2 \* | 7:45 AM: Instructors arrive at Oncor  |
|  |  |  |  |
| **OCTOBER** |  |  |  |
| Tuesday, October 28 | 1:30 PM | RMTTF Meeting\*\*\*  | WebEx and In person at Corpus Christi |
| Wednesday, October 29 | 8:30 AM | TX SET Training \* | 7:45 AM: Instructors arrive at AEP  |
|  |  |  |  |
| **NOVEMBER** |  | NO MEETING |  |
| **DECEMBER** |  |  |  |
|  |  |  |  |
| Thursday, December 4 | 9:30 AM | RMTTF meeting \* | WebEx only |

Note! Changing the location for the October 28th meeting to Corpus Christi hosted by AEP.

The AEP REP workshop is tentatively scheduled for October 30th.

Closest hotel is listed below.

Omni Corpus Christi Hotel

900 North Shoreline Blvd.

Corpus Christi, Texas 78401

Phone: (361) 887-1600

For TX SET 5.0 WebEx training, instructors will gather together to present. This has been found to be effective with eliminating issues previously experienced with transitioning from one presenter to another and other technical difficulties.

**TX SET 5.0 Assignments – slide assignments**

Welcome – CNP – Kathy Scott - (slides 1-6)

1. Introduction to TX SET – Debbie McKeever (slides 7-14) 10 minutes

2. Governing Documents – Kathy Scott (slides 15-34) 25 minutes

a. Other Binding Documents

b. TX SET Swimlanes

c. TX SET Implementation Guides

d. Retail Market Testing

e. TX Set 5.0

i. IAS

ii. Addition of Counties to the address

iii. Switch Hold validations

iv. Meter Cycle change request

v. CSA Start and End Date

3. TX SET Working Group – Kathy (slides 35-39) 10 minutes

4. BREAK

5. Transaction Overview – Sheri (slides 40-55, plus Transaction Inventory Handout) 90 minutes

6. Transaction Process Flows

a. MVI – Monica Jones (slides 56-63) 20 minutes

7. LUNCH

8. Transaction Process Flows (continued)

a. Switch – Melinda Earnest (slides 64-71) 20 minutes

b. MVO – Amy Sue (slides 72-75) 30 minutes

c. Solution to Stacking – Amy Sue (slides 76-85) 30 minutes

d. CSA – Tomas Fernandez (slides 86-90) 30 minutes

e. DNP/RNP – Tomas Fernandez (slides 89-91) 20 minutes

f. New IAS Indicator – Kathy (slides 92-94)

g. Mass Transition – Kathy (slides 95-96) 10 minutes

9. BREAK

10. Market Information System (MIS) Portal

a. Find ESI ID / Find Transactions– Sheri Wiegand (slides 97-109) 25 minutes

11. TX SET Implementation Guides – Kathy Scott/Debbie McKeever (slides 110-113) 10 minutes

12. BREAK

13. TX SET Training Group Exercise – Tomas Fernandez (slides 114-119) 30 minutes

14. Survey

15. Listserv/Appendix & Closing/Survey– Tomas Fernandez (slides 119-131)) 10 minutes

Bonus Tie Breaker Question:

When is the only instance a backdated MVI transaction would not include an IA/CR code

Answer: A safety net transaction

**Changes to the TX SET 5.0 slides**

Links were verified.

Tomas made some slide changes during the last meeting. We verified in today’s meeting.

32-Updated slide 32 with screen shot- finished

33 -Updated

Remove slide 34 – and move to appendix

34 – New TX SET slide

35 – TX SET Working group

58 – flow changed to reflect current process

60 - Slide may need to be adjusted. Some TDSP doesn’t use Retail Business Day – but use calendar days.

ERCOT cancels the move in for permit not received on 30 calendar days.

ERCOT definition for Retail Business Day: *0800 to 1700 Central Prevailing Time (CPT) on weekdays, excluding observed company holidays.*

Kathy found the process in section 11.2.5.6 in the Stacking logic – Sheri is going to ask ERCOT. ERCOT is cancelling the move in on 30 calendar days.

It is ERCOT Operating rule 23: “cancel with exception”

|  |
| --- |
| Catherine, we are having a conversation in our RMTTF meeting talking about our TXSET training and we want to present the correct information.  * How long is ERCOT’s counter to hold an MVI for a permit inspection?  We thought it was 20 Retail Business Days, however, we have seen some cancel at 30 calendar days by ERCOT.    This should be 20 business days from receipt of the 814\_28PT.  If you have examples of items canceling after 30 calendar days – send them over.  It is possible we have a defect somewhere.

This is the language from the Solution to Stacking.“Cancel With Exception allows a 20 Retail Business Day cancellation period for a Move-In Request in a Permit Pending status, starting with the day the 814\_28 transaction, with the Permit Required indicator, is processed by ERCOT.”* Does ERCOT consider weekends and holidays and are the holidays based on the ERCOT holiday calendar?  ERCOT does not include weekends or holidays in the calculation of these 20 days.  We only count ERCOT business days in this calculation.
* Is Day 0 the day the TDSP sends the 814\_28 with a PR?   And the clock starts the next day?  I believe this is correct.  The language I quoted above from Solution to Stacking sort of indicates it might start the day received but I believe it actually is a case where the day received is Day 0 and the next day the counting begins.
* If a permit is not received, is the 814\_08 sent the day following “20 Retail Business Days”?   If ERCOT does not receive the 814\_04 within those 20 business days, ERCOT will send an 814\_08 with PNR code for Permit Not Received.  This is a cancel that the TDSP can accept or reject.  The TDSP then has 7 days to respond to that 814\_08 before we will issue a final cancel with the cancel code MAN.  Sadly the documentation on these 7 days don’t indicate whether they are calendar or business, but I believe it’s 7 business days.

Thanks Catherine – you are always a wonderful resource!  *Stacking Logic 11.2.5.6  ERCOT Operating Rule #23 Cancel w/ Exception* |

Assignments for presenters for the TX SET class.

* Laminated TX SET cards Sheri
* TX SET Transaction Names Inventory sheet Sheri
* Take home laminated sheet Tomas
* Prop showing the inventory sheet Kathy – Change top from 4.0 5.0 at the top
* Answer keys Tomas
* Laminated overview flow Tomas
* Name tags Kathy
* Swim lanes Kathy
* Booklets Kathy
* Pens Kathy
* Wipes to be used Kathy
* Miscellaneous Kathy to coordinate

Debbie and Melinda will have assignments for the next session.

**Next Meeting**

At our next meeting we will update the ppt for MarkeTrak training.

We will also review the MarkeTrak modules.

Will verify or modify as noted below.

Slide 25 – need to be updated to show the 2 new subtypes

DEV LSE vs. 867, Meter Cycle change

Dashboard - slide from Tammy

Slide 64 – checkmark falls before “false”

Slide 87 - On bulk insert – avoid commas all together. Needs to be fixed.

Answer key has been updated for TX SET training

We will verify if EMIL is changed to MIS – TX SET training.

**Other Business**

 No other business was noted.

**Adjourn**

Tomas thanked everyone for attending.

Reminder to register for TX SET training, if they were registered for TX SET 5.0 to make sure and attend or cancel if their plans changed.

Tomas adjourned the meeting.